



E-GRANTS IDEA CONSOLIDATED USER GUIDE



Montana
Office of Public Instruction
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Updated November 2010



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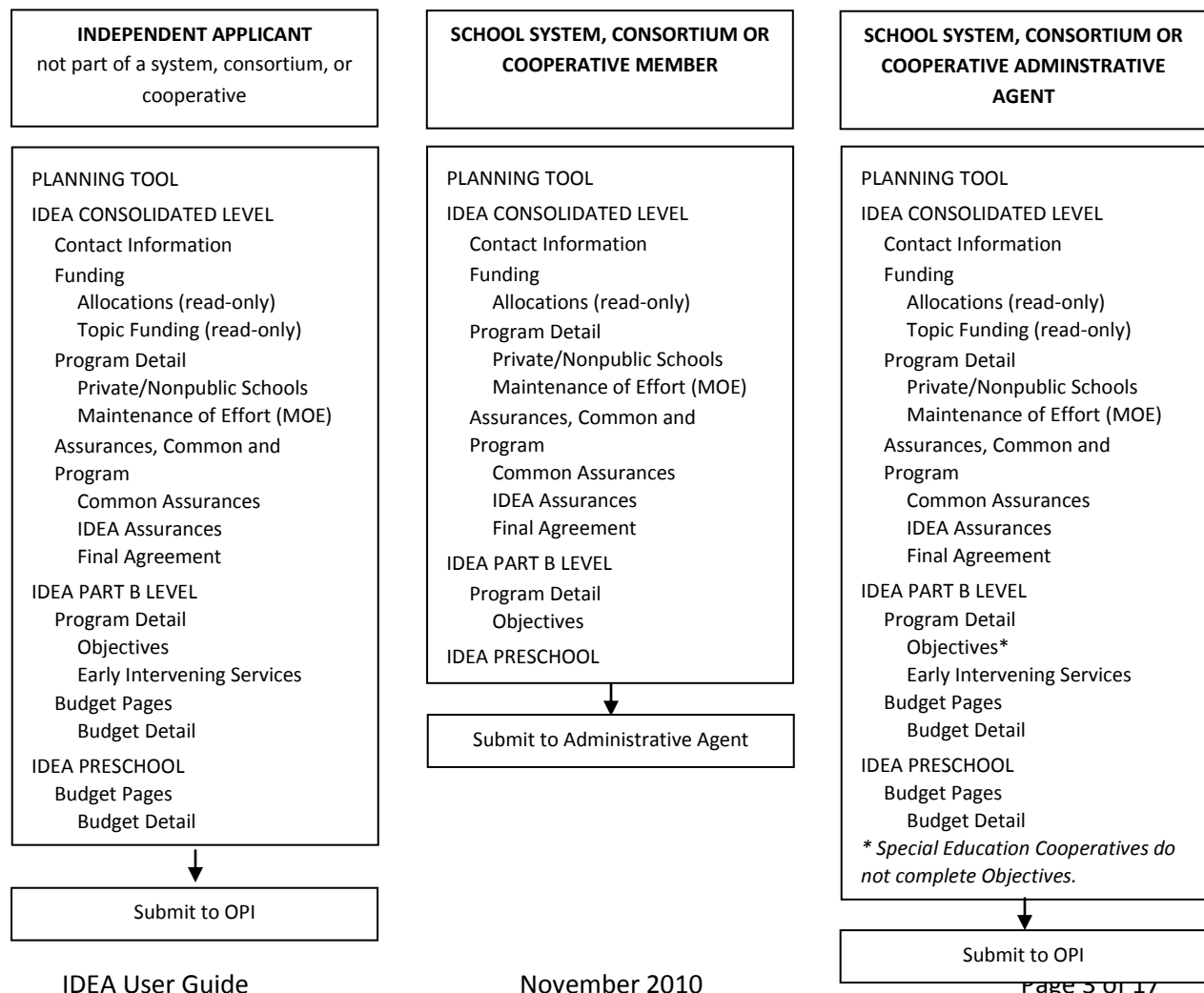


E-GRANTS IDEA CONSOLIDATED APPLICATION SET-UP

The user will be logged in as one of the following:

- An independent applicant (ex: Frenchtown K-12 Schools).
- A special education cooperative administrative agent (ex: Prickly Pear Cooperative), or
- A special education cooperative member.
- A consortium administrative agent (ex: Plains Elementary), or
- A consortium member (ex: Plains HS or Paradise Elem).
- A school system administrative agent (ex: Belgrade Elementary), or
- A system member (ex: Belgrade HS).

The overview below shows sections of the application that must be completed for each type of user.





COMPLETING IDEA CONSOLIDATED APPLICATIONS



For page-specific instructions, click the “Click for Instructions” hyperlink in the upper-right corner of every page. If you need further assistance, click the “Contact Us” hyperlink at the bottom of each page to locate the appropriate OPI specialist.

PLANNING TOOL



The Planning Tool must be completed before any budget or topic funding pages in the application can be completed. Every member of a cooperative or system (combined elementary and high school districts applying with the same application) needs to complete the Planning Tool (Topic 5), e.g., if the elementary district is the designated prime applicant for a system, both entities must complete the Planning Tool separately.

1. *Log into* the E-Grants System using your pre-assigned user ID and password.
 - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have a user ID and password.
2. *Click* **Planning Tool** from the **Menu List**.
 - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have the Planning Tool displayed on the menu list.
3. If more than one LEA is listed, *select* the appropriate LEA.
4. *Click* on the radio button to select the prior year Planning Tool.
5. *Click* the **COPY TO NEW YEAR** button to copy last year’s goals into the new application.
- OR -
6. Complete the Planning Tool for the new application year by clicking **ADD NEW YEAR**.
7. Return to the **Menu List** Page.



Note: Information from the completed Planning Tool is pulled into various pages within the applications.



IDEA CONSOLIDATED APPLICATION



Note: Unlike the ESEA/NCLB Consolidated application where a system's administrative agent submits a single application for the system, all LEA's must complete and submit an IDEA Consolidated application. System, consortium, and cooperative members complete a simplified application, which is submitted to the system/consortium/cooperative administrative agent (AA) for approval. The AA approves the member application(s) and completes a more comprehensive application for submittal to the OPI.

INDEPENDENT APPLICANTS (NOT PART OF A SYSTEM, CONSORTIUM OR COOPERATIVE)

[Click here](#) to skip to the System, Consortium and Cooperative Member Application section.

[Click here](#) to skip to the System, Consortium and Cooperative Administrative Agent Application section.



For page-specific instructions, click the "Click for Instructions" hyperlink in the upper-right corner of every page. If you need further assistance, click the "Contact Us" hyperlink at the bottom of each page to locate the appropriate OPI specialist.

1. *Log into* the E-Grants System using your pre-assigned user ID and password.
 - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have a user ID and password.
2. If the Planning Tool has not been completed, *complete* the Planning Tool.

[Click here](#) to go to the section on completing the Planning Tool.

3. *Click* **IDEA Consolidated** from the **Menu List**.
 - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have this application displayed on the menu list.
4. If more than one LEA is listed, *select* the appropriate LEA.
5. *Create* a new application.
 - *Click* the **CREATE APPLICATION** button.
 - OR -
6. *Continue* an application already created.
 - *Click* on the radio button next to the current application.
 - *Click* the **OPEN APPLICATION** button.



7. Click the **Contact Information** tab.
 - Fill in all required fields and extra e-mail addresses.
 - If district clerks and LEA program staff wish to receive automatic e-mail notifications of approved/returned applications, cash requests, etc., their e-mail addresses must be entered at the bottom of the **Contact Information** page.
 - *Save the page.*
8. Click the **Funding** tab (opens **Allocations Page**).
 - Review allocations for each program.
9. Click the **Topic Funding** tab. (This page is dependent upon the completion of the Planning Tool.)
 - Review topics for IDEA.
 - *Save the page.*



You will not be able to get to the budget pages until the Topic Funding page is reviewed.

10. Click the **Program Detail** tab.
 - Complete **Private/Nonpublic Schools** and **Maintenance of Effort (MOE)** pages.
 - *Save the pages.*
11. Click the **Assurances, Common and Program** tab.
 - The Authorized Representative (AR) is required to sign off, or agree, to the Common Assurances, IDEA Assurances, and the Final Agreement.



The Common Assurances carry over from one application to the next. If the Common Assurances were agreed to during completion of one of the other federal applications, there will be a check in the box upon page load and the **LEA AGREES** button will not be present.

- (AR only) Click the check box on each **Assurance** page.
- *Save the page.*
- (AR only) Click the **LEGAL ENTITY AGREES** button on the **Final Agreement** page. The date will auto-fill.



Go to the **IDEA Part B** level.

- Use the “Application Sections” drop-down list in the upper-right corner of the page.
- 1. Click the **Program Detail** tab.
 - Review and complete all **Objective** pages. The information is prefilled on the **Objective** pages. Follow instructions for selecting activities, when necessary.
 - *Save the pages if changes are made.*
 - Complete the **Early Intervening Services** page.
 - *Save the page.*
- 2. Click the **Budget Pages** tab (opens **Budget Detail** page).
- 3. Complete the **Budget Detail** page.
 - Budget the “Total Allocation Available for Budgeting” displayed at the top of the **Budget Detail** page.
 - Enter the appropriate amount under each Purpose Category and Object Code until “Allocation Remaining” (at the bottom of the **Budget Detail** page) equals \$0.
 - If eligible, enter the “Maximum Indirect Cost” or a lesser amount on Line G.
 - The “Maximum Indirect Cost” is automatically calculated (Line E) on the Budget Detail page for districts with an approved Indirect Cost rate.
 - Districts are not required to enter an indirect cost amount.
 - Click the **CALCULATE TOTALS** button to keep a running total of budgeted allocations.
 - *Save the page.*



Note: the page-specific instructions provide details about Object Codes and Purpose Categories. (“Click for Instructions” hyperlink)

- 4. Complete the **Property and Equipment** page, if applicable.
 - *Save the page.*

Select **IDEA Preschool**. (Use the drop-down list in the upper-right corner.)

- 1. Complete the **Budget Detail** page.
 - Budget the “Total Allocation Available for Budgeting” displayed at the top of the **Budget Detail** page.



- Enter the appropriate amount under each Purpose Category and Object Code until “Allocation Remaining” (at the bottom of the **Budget Detail** page) equals \$0.
- *Save the page.*



Note: the page-specific instructions provide details about Object Codes and Purpose Categories. (“Click for Instructions” hyperlink)

2. Complete the **Property and Equipment** page, if applicable.

- *Save the page.*

Return to the **IDEA Consolidated** level (drop-down list upper-right corner).

1. Click the **Submit** tab.

- Run the consistency check.
- Correct any errors that display.

When all edits have passed the consistency check, a message to the Authorized Representative stating, “Click Submit to OPI button to make final submission of the application for OPI review and approval,” will appear.

2. (AR only) Click the **SUBMIT TO THE OPI** button to *submit* the application.



Note: If district staff with the LEA data entry role are running the consistency check, the button text is, “Submit to Auth Rep.” The application is not submitted to the OPI at this point. The AR must make final submission to the OPI.

Once the application has been submitted, the **Application Select** page status will be “Submitted to SEA.”

The AR and all individuals listed on the bottom of the **Contact Information** page will receive an e-mail notification stating that the application has been submitted for review.

USING THE LOCK APPLICATION AND UNLOCK APPLICATION BUTTONS ON THE SUBMIT PAGE

- Use the **LOCK APPLICATION** button to lock the application thereby preventing changes to completed application pages. Use the **UNLOCK APPLICATION** button to unlock the application when page modifications are needed.



- Only the user who locked the application and/or the district AR can unlock a locked application.
- A successful Consistency Check automatically locks the application. The **UNLOCK APPLICATION** button should be used to unlock the application if changes are needed after the consistency check has run.
 - Only the user who initiated the consistency check and/or the district AR can unlock the application after the consistency check locks it.

SYSTEM, CONSORTIUM AND COOPERATIVE MEMBER APPLICATIONS

[Click here](#) to go to the Independent Applicant section.

[Click here](#) to go to the System, Consortium and Cooperative Administrative Agent Application section.




For page-specific instructions, *click* the “Click for Instructions” hyperlink in the upper-right corner of every page. If you need further assistance, click the “Contact Us” hyperlink at the bottom of each page to locate the appropriate OPI specialist.

1. *Log into* the E-Grants System using your pre-assigned user ID and password.
 - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have a user ID and password.
2. If the Planning Tool has not been completed, *complete* the Planning Tool.

[Click here](#) to go to the section on completing the Planning Tool.

3. *Click* **IDEA Consolidated** from the **Menu List**.
 - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have this application displayed on the menu list.
4. If more than one LEA is listed, *select* the appropriate LEA.
5. *Create* a new application.
 - *Click* the **CREATE APPLICATION** button.
 - OR -
6. *Continue* an application already created.
 - *Click* on the radio button next to the current application.
 - *Click* the **OPEN APPLICATION** button.



7. Click the **Contact Information** tab.
 - Fill in all required fields and extra e-mail addresses.
 - If district clerks and LEA program staff wish to receive automatic e-mail notifications of approved/returned applications, cash requests, etc., their e-mail addresses must be entered at the bottom of the **Contact Information** page.
 - *Save the page.*
 8. Click the **Funding** tab (opens **Allocations Page**).
 - Review allocations for each program.
 - The member allocation will be in RED on the “Transfer Out” row. This means that it will be transferred into the Administrative Agent's (prime applicant) application for budgeting.
 9. Click the **Program Detail** tab.
 - *Complete Private/Nonpublic Schools* and **Maintenance of Effort (MOE)** pages.
 - *Save the pages.*
 10. Click the **Assurances, Common and Program** Tab.
 - The Authorized Representative (AR) is required to sign off, or agree, to the Common Assurances, IDEA Assurances, and the Final Agreement.
-  The Common Assurances carry over from one application to the next. If the Common Assurances were agreed to during completion of one of the other federal applications, there will be a check in the box upon page load and the **LEA AGREES** button will not be present.
- (AR only) Click the check box on each **Assurance** page.
 - *Save the page.*
 - (AR only) Click the **LEGAL ENTITY AGREES** button on the **Final Agreement** page. The date will auto-fill.

Go to the **IDEA Part B** level.

- Use the “Application Sections” drop-down list in the upper-right corner of the page.
1. Click the **Program Detail** tab.
 - *Review and complete* all **Objective** pages. The information is prefilled on the **Objective** pages. Follow instructions for selecting activities, when necessary.



- *Save the pages if changes are made.*

Return to the **IDEA Consolidated** level (drop-down list upper-right corner).

1. Click the **Submit** tab.
 - Run the consistency check.
 - Correct any errors that display.

When all edits have passed the consistency check, a message to the Authorized Representative stating, "The application has not yet been submitted. Click below to submit the application to the Administrative Agent," will appear.

2. (AR only) Click the **SUBMIT TO ADMIN AGENT** button to *submit* the application to the Administrative Agent.



Note: If district staff with the LEA data entry role are running the consistency check, the button text is, "Submit to Auth Rep." The application is not submitted to the Administrative Agent at this point. The district Authorized Representative must make final submission to the Administrative Agent.

Once the application has been submitted, the **Application Select** page status will be "Submitted to AA."

USING THE LOCK APPLICATION AND UNLOCK APPLICATION BUTTONS ON THE SUBMIT PAGE

- Use the **LOCK APPLICATION** button to lock the application thereby preventing changes to completed application pages. Use the **UNLOCK APPLICATION** button to unlock the application when page modifications are needed.
 - Only the user who locked the application and/or the district AR can unlock a locked application.
- A successful Consistency Check automatically locks the application. The **UNLOCK APPLICATION** button should be used to unlock the application if changes are needed after the consistency check has run.
 - Only the user who initiated the consistency check and/or the district AR can unlock the application after the consistency check locks it.



SYSTEM, CONSORTIUM AND COOPERATIVE ADMINISTRATIVE AGENT APPLICATIONS

[Click here](#) to go to the Independent Applicant section.

[Click here](#) to go to the System, Consortium and Cooperative Member Application section.



For page-specific instructions, click the “Click for Instructions” hyperlink in the upper-right corner of every page. If you need further assistance, click the “Contact Us” hyperlink at the bottom of each page to locate the appropriate OPI specialist.

Step 1: Approving Member Applications




Note: The process of approving member applications involves two browser windows open concurrently. Use caution going between the browser windows to avoid unintentionally closing the browsers.

1. *Log into* the E-Grants System using your pre-assigned user ID and password. (Browser 1)
 - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have a user ID and password.
2. *Click* **IDEA Consolidated** from the **Menu List**.
 - Contact the E-Grants Security Officer at (406) 444-3448 if you do not have this application displayed on the menu list.
3. *Select* the Administrative Agent LEA on Organization Select page.
4. *Create* a new application.
 - Click the **CREATE APPLICATION** button.

- OR -
5. *Continue* an application already created.
 - *Click* on the radio button next to the current application.
 - *Click* the **OPEN APPLICATION** button.
6. *Click* the **Funding** tab (opens **Allocations Page**).
 - Review allocations for each program.
7. *Click* the blue link in the middle of the page on the “Administrative Agent” row.
 - A new browser page will open (Browser 2).



- Browser 2 lists all member districts, district type (system, cooperative), current application status (submitted, not submitted) and respective allocation information.
 - The “LE#” in the left-hand column is a hyperlink to the member’s IDEA application.
8. When the member application is in “Submitted to AA” status, *click* the member LE# hyperlink.
- The member’s IDEA application will open in Browser 1.
9.  *Review* the member’s application for accuracy.
10. *Click* the **Submit** tab.
11. *Click* either the **APPROVE** or **REJECT** button.
- If rejected, the application will go back to the member for updates.
 - *Return* to Browser 2.
 - *Click* on the “Return to Admin Agent's Application Select” hyperlink (upper-right-hand corner).
 - This re-establishes your application in Browser 1.
 - Go back to Browser 2.
 - *Click* on the “Close Browser” hyperlink (upper-right-hand corner).



Note: all member applications must be approved before the Administrative Agent can submit their application.

Step 2: Completing Administrative Agent Applications

1. If the Planning Tool has not been completed, *complete* the Planning Tool.
[Click here](#) to go to the section on completing the Planning Tool.
2. *Create* or *Open* the current year application.
3. *Click* the **Contact Information** tab.
 - Fill in all required fields and extra e-mail addresses.



- If district clerks and LEA program staff wish to receive automatic e-mail notifications of approved/returned applications, cash requests, etc., their e-mail addresses must be entered at the bottom of the **Contact Information** page.

- *Save the page.*

4. Click the **Funding** tab.

5. Click the **Topic Funding** tab. (This page is dependent upon the completion of the Planning Tool.)

- Review topics for IDEA.

- *Save the page.*



You will not be able to get to the budget pages until the Topic Funding page is reviewed.

6. Click the **Program Detail** tab.

7. Click the **Private/Nonpublic Schools** page.

- Enter Administrative Agent's Private/Nonpublic schools information. Member data is displayed (pulled in from member application(s)).

- *Save the page.*

8. Click the **Maintenance of Effort (MOE)** tab.

- State and local funds expenditures from two years prior for all members are prefilled.
- *Enter* the amount of the Special Education Cooperative or Administrative Agent's state and local funds to be budgeted for the application year.

- *Save the page.*

9. Click the **Assurances, Common and Program** tab.

10. The Authorized Representative (AR) is required to sign off, or agree, to the Common Assurances, IDEA Assurances, and the Final Agreement.



The Common Assurances carry over from one application to the next. If the Common Assurances were agreed to during completion of one of the other federal applications, there will be a check in the box upon page load and the **LEA AGREES** button will not be present.



11. (AR only) *Click* the check box on each **Assurance** page.
 - *Save the page.*
12. (AR only) *Click* the **LEGAL ENTITY AGREES** button on the **Final Agreement** page. The date will auto-fill.

Go to the **IDEA Part B** level.

- Use the drop-down list in the upper-right corner.
1. *Click* the **Program Detail** tab.
 - *Complete* the **Early Intervening Services** page.
 - *Save the page.*
 2. *Click* the **Budget Pages** tab (opens **Budget Detail** page).
 3. *Complete* the **Budget Detail** page.
 - Budget the “Total Allocation Available for Budgeting” displayed at the top of the **Budget Detail** page.
 - *Enter* the appropriate amount under each Purpose Category and Object Code until “Allocation Remaining” (at the bottom of the **Budget Detail** page) equals \$0.
 - If eligible, *enter* the “Maximum Indirect Cost” or a lesser amount on Line G.
 - The “Maximum Indirect Cost” is automatically calculated (Line E) on the Budget Detail page for districts with an approved Indirect Cost rate.
 - Administrative Agents are not required to enter an indirect cost amount.
 - *Click* the **CALCULATE TOTALS** button to keep a running total of budgeted allocations.
 - *Save the page.*



Note: the page-specific instructions provide details about Object Codes and Purpose Categories. (“Click for Instructions” hyperlink)

4. *Complete* the **Property and Equipment** page, if applicable.
 - *Save the page.*

Select **IDEA Preschool**. (Use the drop-down list in the upper-right corner.)

1. *Complete* the **Budget Detail** page.
 - Budget the “Total Allocation Available for Budgeting” displayed at the top of the **Budget Detail** page.



- Enter the appropriate amount under each Purpose Category and Object Code until “Allocation Remaining” (at the bottom of the **Budget Detail** page) equals \$0.

- *Save the page.*



Note: the page-specific instructions provide details about Object Codes and Purpose Categories. (“Click for Instructions” hyperlink)

2. Complete the **Property and Equipment** page, if applicable.

- *Save the page.*

Return to the **IDEA Consolidated** level (drop-down list upper-right corner).

1. Click the **Submit** tab.

- Run the consistency check.
- Correct any errors that display.

When all edits have passed the consistency check, a message to the Administrative Agent (AA) stating, “Click Submit to OPI button to make final submission of the application for OPI review and approval,” will appear.

- (AA only) Click the **SUBMIT TO THE OPI** button to *submit* the application.



Note: If district staff with the LEA data entry role are running the consistency check, the button text is, “Submit to Admin Agent.” The application is not submitted to the OPI at this point. The AA must make final submission to the OPI.

Once the application has been submitted, the **Application Select** page status will be “Submitted to SEA.”

The AA and all individuals listed on the bottom of the **Contact Information** page will receive an e-mail notification stating that the application has been submitted for review.

USING THE LOCK APPLICATION AND UNLOCK APPLICATION BUTTONS ON THE SUBMIT PAGE

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